

**TAX
PRACTITIONER
USER MANUAL**
January 2003

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1.0 PROCESS SUMMARY OVERVIEW

The Tax Practitioners application is a subprogram of the External Address (EA) application, an order and distribution program which tracks orders for several subprograms. The orders are input at all Area Distribution Centers (ADCs) or National Office terminals that are connected to the Computer Assisted Publishing System (CAPS) mainframe computer. The orders are uploaded nightly to the Detroit Computer Center and filled using the Centralized Inventory Distribution System (CIDS) order generate programs. When the order has been filled a file is then downloaded from CIDS to the Computer Assisted Publishing System (CAPS) and loaded onto the EA DB/2 Databases. These files contain shipped quantities and shipped dates by account and form name.

This application enables IRS facilities to maintain and process approximately 300,000 requests from tax practitioners for information, copies of tax forms and instructions. This application produces over 4,000,000 picking tickets and mailing labels to fill annual orders.

2.0 SECURITY

The Tax Practitioners application is used by staff at the Area Distribution Centers and by Management Analysts within the Specialty Program Section.

In order to obtain access to the Tax Practitioner application in CAPS, IRS staff must submit a written request to the Application Owner asking for an increased level of security access. The Application Owner will work with the Configuration Manager and the Database Administrator to determine the appropriateness of this request and will contact the requestor when a decision has been made.

External Tax Practitioners can update their own information via the Internet, but they do not have access to CAPS.

4.0 TAX PRACTITIONER MAIN MENU

Once you have entered TP on the External Address Main Menu screen, you will arrive at the Tax Practitioner Main Menu, shown below. There are 7 functions listed on the main screen to choose from. Functions 1 through 4 require that account numbers be entered in order to access the screen. Your ability to access these Functions may vary depending on the type of Security Clearance you have.

Press PF3 to go back to the External Address Main Menu screen.

```
EA00M01                TAX PRACTITIONER
                        External Address System
-----
                        Enter Function ===>  __
Enter Customer Account Number ===>  _____

+-----+
| Functions ====>  1  CUSTOMER ADDRESS ENTRY      |
|                  2  CUSTOMER ORDER ENTRY/CHANGE |
|                  3  ADD NEW RE-ORDER             |
|                  4  SEARCH RE-ORDERS             |
|                  5  ADD NEW ACCOUNT              |
|                  6  PRODUCTS TABLE             |
|                  7  SEARCHES                    |
|                                                    |
|                                                    |
|                                                    |
+-----+
```

5.0 FUNCTION #1 – CUSTOMER ADDRESS ENTRY SCREEN

Press Function # 1 on the Tax Practitioner Main Menu screen to obtain a customer's address or phone number. You must have an account number to access this screen.

If you make any changes to the customer's address information, you must press PF6 or the revision(s) will not be saved to the database.

Press PF4 to view the customer's order history.

Press PF9 if you want to re-order documents to be sent to this customer.

Press PF10 if you want to perform a search of the Tax Practitioners database.

Press PF3 to go back to the Tax Practitioner Main Menu screen.

```
TP10S01                Tax Practitioner
                        Address Information Screen
-----
Address Information:
  Account: 100033  E                                Phone Number:( 000 ) 000 - 0000
                                                    Employees:
    First Name: DON
    Last Name:  ADAMS
    Organization: PDQ ACCT SERVICES
    Apt/Suite/Attn: _____
    Address: 1811 HIGHWAY 15 S
    City: GREENSBORO
    State: GA Zip: 30642 - 2817 - 00
    Foreign Country: _____
    Foreign Zip: _____
    Job Code:  _

    Response Date:                Status Code: N
    Entry Date:                  Last Updated:                Last Update Id:
    Center:                      Region:                      District:

-----CAPS
ENTER=ACCOUNT PF1=HELP PF3=EXIT PF4=ORD PF5=NEW PF6=UPD PF9=ADD REO PF10=SRCH
Remember to Update (PF6).
```

6.0 FUNCTION #2 – CUSTOMER ORDER ENTRY/CHANGE SCREEN

To view a customer's recent order history, and to add or change orders which have not yet been filled, select Function #2 from the Tax Practitioners Main Menu. You will need to know the customer's account number in order to select this function.

As an alternative, you can access this screen by pressing PF4 when you are still in Function #1, the Customer Address Entry Screen. Pressing PF4 from the Order Information Screen will take you to the Customer Address Entry screen (Function #1).

Place a 'C' to change in the CHG field next to the appropriate item. If you make any changes, additions, or deletions, you must remember to press PF6 for the revisions to be saved in the database.

To return to the Tax Practitioners Main Menu, press PF3.

```
EA20S01                                TAX PRACTITIONER
                                      Order Information Screen
-----
Account: 100033   E      Organization: PDQ ACCT SERVICES
                              Type:
Add/          Chk Pre           Form       Order    Ship     Shipped     Cids Order  Cids
Chg Catnum Ltr            Name         Qty        Qty        Date       Generate Flag
-   10232   I K PACKAGE X VOL I   1         1        2001-01-12
M   63514   Z K PACKAGE X VOL II  1         1        2001-01-12
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
-   _____ - - _____
NO MORE
-----CAPS
PF3=Exit PF4=Addr PF6=Confirm PF7=Back PF8=Forw A=Add C=Chg D=Del M=More
Remember to Change (C) each Order if this is first time.
```


6.1 OBTAINING MORE INFORMATION ABOUT A SHIPMENT

To obtain more information about a shipment to a customer, type an "M" (for MORE) in the ADD/CHG field next to the item you are researching. The following screen will appear.

Press PF3 to return to the Tax Order Information Screen.

```
EA22S01      TAX PRACTITIONER
              Additional Order Information Screen
-----
Account: 100033 _   Firm / Company: PDQ ACCT SERVICES
Catnum: 63514 Z Item: KPACKAGE X VOL II
Quantity Ordered: 1 Order Date: 2000-12-29 Order Time: 15.40.28
Quantity Shipped: 1 Ship Date: 2001-01-12
Original Order Qty: 1
Cids Quantity:        Cids Date:            Cids Order Gen:           
Cids Flag:   
Contractor Quantity: 1 Cont Date: 2001-01-05
Last Update Date: 2000-12-29 Last Update Id: ZEHR
-----CAPS
PF1=HELP PF3=Return
```


8.0 FUNCTION #4 – SEARCH/CHANGE CUSTOMER RE-ORDERS SCREEN

Select Function #4 from the Tax Practitioner Main Menu when you need to search for or modify a customer's account or re-orders. You must enter the Account Number from the Main Menu in order to use this option. Once you do, you will see the Address Information Screen for that customer, similar to what you would find if you had selected Function #1, except that the information is already filled in for you.

Press PF4 to view the order history for this account.

Press PF5 to leave a comment in the Address file of this account. (See Section 8.1.)

If you make any changes or modifications to the information on this screen, you must remember to press PF6 before exiting. If you do not press PF6 to Update the file, your revisions will not be saved to the Tax Practitioner database.

Press PF9 to place a re-order for this account. This serves the same function as selecting Function #3 from the Main Menu.

To return to the Tax Practitioners Main Menu, press PF3.

```
TP10S01                Tax Practitioner                2001-08-15    LANSLOW
                        Address Information Screen        16:04:45
-----
Address Information:
  Account: 100033  E                                Phone Number: ( 000 ) 000 - 0000
                                                Employees:       
    First Name: DON
    Last Name:  ADAMS
  Organization: PDQ ACCT SERVICES
  Apt/Suite/Attn:                                   
    Address:    1811 HIGHWAY 15 S
    City:       GREENSBORO
    State:      GA Zip: 30642 - 2817 - 00
Foreign Country:       
Foreign Zip:                                      
Job Code:      -
Comment:
Response Date:                Status Code: N
Entry Date:                  Last Updated:                Last Update Id:
Center:                      Region:                District:
-----CAPS
ENTER=Account,F3=Exit,F4=Orders,F5=CommF6=Update,F9=Add Reorder,F10=Search,F11=
```

8.1 COMMENTS IN ADDRESS FILE

To leave a comment in a Tax Practitioner Account File, press PF5 from the Address Information Screen.

You must press PF6 to have the information saved to the database. If you do not press PF6, your modifications will not be saved.

Press PF3 to return to the Address Information Screen.

| | | | |
|---------|------------------|------------|---------|
| EA60S01 | TAX PRACTITIONER | 2001-08-15 | LANSLow |
| | Comment Screen | 16:10:38 | |

| | |
|-----------------|---------------------------------|
| Account: 100033 | Organization: PDQ ACCT SERVICES |
| Comment: | Type: |

-----CAPS
PF3=Back to Address Screen, PF6=Add/Update

9.0 FUNCTION #5 – ADD NEW CUSTOMER ACCOUNT

Selecting Function #5 from the Main Menu allows the user to add a new customer account to the Tax Practitioner database.

Not all CAPS users have access to this capability. Those without the correct level of security who attempt to use this function will receive an error message which reads, "Account Cannot Add New Customers". If you believe you have received this message in error and that your User ID should possess the level of security access to create accounts, then you will need to contact the Application Owner and request further access.

Enter as much information as possible into the form. Use the TAB key to move from field to field. You must provide either a last name or an organization name. You will be prompted for one of these if you attempt to save the record without either of them.

You must press PF2, Add, to save the new account to the Tax Practitioner database. If you do not press PF2 before exiting this screen, your modifications will not be saved.

Press PF3 to cancel the entry and return to the Tax Practitioner Main Menu.

```
TP10S01                Tax Practitioner
                        Add Address Information Screen
-----
Address Information:
  Account: _____ Phone Number: ( ____ ) ____ - ____
                        Employees: _____
    First Name: _____
    Last Name:  _____
  Organization: _____
  Apt/Suite/Attn: _____
    Address:   _____
    City:      _____
    State: ____ Zip: _____ - ____ - ____
Foreign Country: _____
  Foreign Zip: _____
    Job Code:  _____
    Comment:   _____
  Response Date: _____ Status Code: ____
    Entry Date: _____ Last Updated: _____ Last Update Id:
    Center:      Region: _____ District: _____
-----CAPS
PF1=HELP, PF2=Add, PF3=Exit
```

From the Tax Practitioner Main Menu Screen, select Function #6 to reach the Tax Practitioner Products File Screen.

Press PF3 to return to the Re-Order Screen.

-----CAPS-----
PF3=End, PF7=Back, PF8=Forward, A=Add, C=Change, D=Delete, Enter=Search

11.0 FUNCTION # 7 – SEARCHES

If you do not know the Tax Practitioner's account number, you may perform a search for it by choosing Function #7 from the Tax Practitioner Main Menu Screen. Selecting that Function will bring you to the Search Information Screen, shown below.

Using the Function Keys, it is possible to search the database by Country (PF5), Account number (PF9), Telephone number (PF10), ZIP Code (PF11), or Last name of customer (PF12).

Once you have entered the search parameter, press the appropriate Function Key to initiate the search process. Use PF8 to scroll to the next page if the list runs more than one page; use PF7 to scroll back to a previous page.

When you find the account for which you desire more information, place an X in the field to the left of the account number and then press Enter. That will take you to the Tax Practitioner Address Information Screen (Function #1).

Press PF3 to return to the Tax Practitioner Main Menu.

```
EA80S01                                TAX PRACTITIONER
Search: _____ Search Information Screen
-----
X      Account      Last-Name      First-Name      Company-Name
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-
-----CAPS
PF3=Exit PF5=Cntry PF7=Back PF8=Forward PF9=Acct PF10=Phone PF11=Zip PF12=Last
```